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# The Learning Systems Approach to Staff Development and Training at Multnomah County Library

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Multnomah County Library, with a history that reaches back to 1864, consists of a central library, 14 branch libraries and a collection of almost 2 million books and other library materials. As Oregon's largest public library, we serve over one-fifth of the state's population. Today our staff numbers 301 full-time, 201 part-time and 128 on-call employees.

The library has a long tradition of supporting staff training and development. In early 1998, the library had many elements of a "learning infrastructure" in place. The system had technology trainers who offered formal and informal instruction on technology topics; several committees were responsible for presenting training (the Reference Committee, for example); Multnomah County offered classes for staff; and outside vendors provided network training. Staff also participated as presenters and attendees at local, regional and national conferences and workshops, and supported each other through on-the-job training. But it was never enough, and with all of the changes happening in our work environment the challenges of keeping up to date were daunting.

One such change in our environment was the passage of a \$37 million levy in 1997 and the funding of an extensive program of branch renovation. This new funding dramatically increased the number of public service hours and the number of public access computers and staff computer work stations. Public services hours increased 64 percent, including open hours every Sunday at Central and all branch libraries, and the computer count went from 604 to 1,008.

To help cope with this change, library management and staff identified training as one of the top organizational priorities and began to establish a more so-

phisticated, integrated approach to staff training and development. In early 1998, we decided to create the Learning Systems group to strengthen the learning environment and to help develop the processes and tools that would be required to distribute training and development throughout the library, and integrate learning into all library initiatives.

The Library, as a unit of county government, had also begun to integrate a quality program known as RESULTS (Reaching Excellent Service Using Leadership and Team Strategies) and was participating in the Oregon Quality Assessment process. A quality improvement council had been formed and the organization was beginning to move toward team-based initiatives.

The theoretical background supporting this decision was the work on learning organizations and chaos theory. For a useful mediagraphy on learning organizations see: [www.albany.edu/~k17686/learnorg.html](http://www.albany.edu/~k17686/learnorg.html). For information on Dr. Peter Senge's work see: [www.fieldbook.com](http://www.fieldbook.com), and for a quick overview of the publication *Why Learning Organizations?* see: [world.std.com/~lo/WhyLO.html](http://world.std.com/~lo/WhyLO.html).

This article reports on some of the first year's activities as we began implementation of the learning systems approach. Although these activities have been developed in the context of a large metropolitan library, we think the approach and some of the specific activities could be beneficial to libraries of all sizes and types.

## **The New MCL Approach**

The learning systems approach was formally begun in July of 1998 and is just now beginning to emerge. This new kind of thinking and acting requires risk-taking and patience. It requires dialogue and discussion; revision and redesign.

### *Management*

One of the first steps was to hire a Learning Systems Manager at the senior management level. This position was created to provide a "choreographer" to help direct the many already existing training activities toward the accomplishment of broader organizational initiatives, to help identify and fill in any missing pieces in the system's infrastructure, to reallocate resources as needed, and to help pace and prioritize the many training opportunities available to staff.

### *Staffing*

Decisions regarding staffing have proven to be among the most difficult. The vision is to have a small number of positions allocated to learning systems, and to integrate learning and teaching into virtually every job description. Within this vision, learning systems staff are the coordinators and communicators, while staff from throughout the system are called on to help create curriculum and deliver the training.

In the first year the Learning Systems staff included a full time senior manager, a supervisor (expanded from

.5 to 1 FTE), a senior support staff (expanded from .5 to 1 FTE) and a trainer at the Librarian II level (decreased from 2 FTE to .5). In addition, over 100 staff participated in the direct delivery of staff training during the year.

We are currently reviewing the level of staff assigned to the group. Consideration is being given to establishing an adult learning specialist position to bring more expertise to curriculum development and design. The definition of this role will be a high priority in the next year.



Central Library Director Cindy Gibbon, reacting to staff comments during new staff orientation.

### **Budget**

A first-year imperative was to begin to assess the budget implications of distributed training. Each department has begun to analyze the cost of staff time spent developing, delivering and taking training as well as out-of-pocket expenses such as registration and travel costs. The Learning Systems budget included funds for unexpected training opportunities and team travel. Data collected this year will be used to improve our budgeting methods and to establish annual goals expressed as a percentage of total personnel budget.

### **Communication**

Trying to keep everyone informed about the new learning approach presents a real challenge. An already existing intranet site and newsletter have been expanded to include broad coverage of learning opportunities. The *Learning Center* is the intranet site that attempts to provide one-stop access to a wide variety of learning related resources including lists of classes for staff, classes for the public, conference and workshop information and registration, independent learning resources (online tutorials, online learning opportunities), and professional development links.

Learning Systems also publishes the *Learning Link*, a newsletter of learning opportunities for MCL staff members. Published about every six weeks, this online newsletter announces forthcoming classes, features a

popular column by the NT Server Manager, and generally tries to keep staff informed.

### **Individual Learning Plans**

With so much going on in the organization, we needed to focus on the individual and his/her own learning needs. Adopting the "individual development planning" model often cited in human resources literature, we are deploying Individual Learning Plans (ILPs) for all staff. Prototyped by supervisors, managers and by staff at three branches, the ILP is now being rolled out to all staff. The ILP includes a self-assessment tool that allows staff members the opportunity to examine their own training/learning needs and to decide how to integrate this learning into day-to-day responsibilities. This emphasis on the responsibility of the individual to take charge of their own learning is an important component of learning organization approach.

Currently over 150 staff have begun to develop ILPs. The deployment of the plans is being staggered to help the system develop the capacity to provide the type of training and development activities that staff identify during this process.

### **New Staff Survival Training**

On July 1, 1998, the MCL libraries increased public service hours by 60 percent. This called for a bold approach to training the new pages, clerks and library assistants that were being hired in large numbers.



Small group activities are a key component to staff learning sessions.

### **Circulation Staff**

We calculated that approximately 40 new circulation employees would have to be trained and ready to take their places at circulation desks throughout the system on July 1. Traditionally, such training would take place in each library or section one-on-one between the supervisor and the new employee. To integrate the large number of new staff, we needed a different approach.

In a bold new initiative, six clerks who had demonstrated the skills to be good trainers (and knew how

to figure out the details to accomplish this) were selected from various branches to create a peer-based training program. As described by the supervisor who helped put this program together: "Some came willingly, some not so willingly; some had concrete ideas of how this could be accomplished; some didn't have a clue. Their charge was short: 'Go forth... train these new clerks not to work at the branch they are assigned to, but to work for Multnomah County Library.'"

This team created a five-day program that addressed various learning styles and used a variety of training techniques, including lectures and hands-on experiences. This intensive training was supplemented by updated training manuals and the establishment of a mentor program. The mentors developed a time line and checklist of tasks to be learned over the first three months of employment.

The program has been very successful and very well received by both trainees and supervisors. It has also established the precedent for peer-based training. Unfortunately, we seriously underestimated the number of people who would need the training. The original program, or a condensed version, has now been presented to over 185 people, including new clerks, library assistants, librarians, supervisors and on-call staff. The training is now being offered once a month and all new circulation staff must take this training before being assigned to a branch or section.

#### **Library Assistants**

The library assistant curriculum was prepared collaboratively by over 25 library staff members and delivered in an intensive two-week time frame. The training included an overview of the library system, basic reference skills training, technology training (including equipment troubleshooting), introduction to the Library's online catalog *Dyna*, and an introduction to Multnomah County Library's electronic reference environment. This last component has proven to be the most challenging, as its complex and ever-changing, ever updated nature requires ongoing retraining of library staff.

Although the course was very intense and only covered the materials at an introductory level, course evaluations were generally very favorable and supervisors reported a high level of performance from the new staff. The course has been offered four times in the past 13 months to 89 reference staff. Incorporating the "Plan, Do, Check, Act" model of quality improvement, many adaptations and modifications have been incorporated into this model of quality improvement.

We have now packaged the core curriculum that was established for the group presentations so that individuals or small groups can do most of their learning in a self-directed format. The Library does not expect to be hiring enough LA's at any one time to make it economical to offer the two-week classroom model of training, so we are now moving to individualized learning modules.

#### **New Staff Orientation**

Having the opportunity to welcome over 150 new staff members and to help many existing staff prepare for promotions and new assignments in the organization is an enviable situation, but it also presented a challenge to provide adequate learning in a timely manner. Beyond the specific skills training offered by the "survival training" described above, we have revised and refreshed two in-service programs that had long been offered at Multnomah County Library.

All new staff are now invited to attend a four-hour welcome and orientation hosted by the Library's management team. This session outlines the mission of the Library, its history, and gives insight into current programs and initiatives. The orientation includes small group discussions with the executive team and representatives from the library's Quality Council.



Deputy Director Ruth Metz, architect of Learning Systems structure.

#### **Intellectual Freedom Training**

The Intellectual Freedom course covers the basics of the importance of free and open access to ideas and the role of the public library. In recent years this has become the forum for training new staff to interact in a positive way with the community and the media on such topics as internet filtering, censorship, and the public library's concern for the safety of children. Trainers from all areas of library service, from youth services to materials selectors to associate directors, take part in directing this training. This course is required for all new staff and all employees are encouraged to take this class at least once every three years.

#### **Technology Training**

When MCL first implemented the Microsoft Office Suite (1996 to 1997), a full-time staff member was assigned to technology training. Multnomah County contracted with an outside vendor to provide a series of classes on Word, Access, Excel, PowerPoint, and the NT environment. We also purchased online tutorials and made them available for individualized training.

These classes are still available to all staff, but they are generally all-day sessions that are difficult to schedule and sometimes too general to be helpful. We are now looking for shorter classes and desktop tutorials that can be customized for library purposes.

In the meantime, an important part of our technology training approach is the TechnoMentors. This group was developed when staff computers were first upgraded with email capabilities. The need for training was urgent and widespread. A staff member from each branch and section was selected to learn the software and became responsible for teaching others in their work group. The roles and responsibilities of TechnoMentors continue to evolve, but they are key to the continuing learning that occurs as new staff join a work group and as technology tools are deployed.

### System Initiatives

Beyond survival training, orientation, and technology training, Multnomah County Library has several system initiatives that include staff learning objectives, and we have begun to develop training programs to address these issues.



Ellen Fader, Youth Service Coordinator, leads a staff discussion.

The first example is called "Everyone Serves Youth" and was launched in March of this year. This comprehensive curriculum provides staff with the information and skills necessary to serve all young library users at an excellent level of service.

The curriculum consists of six half-day workshops. The introductory workshop has two versions, one for reference staff and one for all other library staff. This course examines the Library's services to youth from prebirth through high school age, exploring stages of youth behavior and giving staff the opportunity to explore successful approaches to helping kids in library situations. This introductory course is now required for all new staff and strongly recommended for continuing staff.

Other courses cover reference services, reader advisory topics, and a course on working with the very young child. These courses are optional but highly

recommended. As each course is scheduled twice a year, staff are able to include these sessions as learning objectives in their individual learning plans.

The process developed to put this curriculum together was an important learning experience for the organization. The Learning Systems Manager and the Youth Services Coordinator met to outline the breadth and scope of the curriculum. A youth services librarian was selected to be the project manager. Then teams of youth services librarians and library assistants were created to develop and deliver the individual courses. This was a significant allocation of time and energy. The teams had relatively short deadlines and for many staff this was a new way of working together. The teams were asked to evaluate their process as well as its product. These evaluations indicate that while working in teams can be challenging and even difficult, the results are worth it. Evaluations by the attendees indicate that the new approach resulted in excellent learning opportunities.

A second example of a system initiative is the "Branch Staff Readiness" program. As we plan for each branch renovation, we also plan a staff readiness program. Beginning with the development of an individual learning plan, staff members of a branch about to be renovated identify what they would like to learn before the branch reopens. This process is still under development, but some examples of learning activities include branch reference staff working at Central Library; circulation and page staff taking computer classes and working in branches that already have the new electronic capabilities in place; and branch leaders taking on special system-wide projects to develop project management skills.

About one month before the scheduled reopening, the staff comes together for a one day workshop on team building and communication. During this day together, the staff writes the branch mission, establishes ground rules for working together, and does several team exercises to increase communication.

About 10 days before the branch reopens, the staff begins an intensive period of training combined with the physical work of getting a branch ready for the public. This training gives staff the opportunity to gain some comfort with the electronic resources that will be available in the branch, as well as providing some practice time using library computer applications. Throughout this time, the staff is using team building skills and establishing working relationships that will help them deliver outstanding public service.

So far, 78 staff have participated in these training programs. Each branch staff member has made very useful suggestions for continuously improving the quality and quantity of this training. The best improvement so far is the addition of a brunch—prepared by the staff of the most recently renovated branch for the weary staff of the about-to-be reopened branch!



A third system initiative is to be responsive to learning opportunities as they arise. The budget for conference and travel has been significantly increased and targeted to fund team attendance at workshops or conferences on strategic topics. As part of this conference travel, each team is charged to return to the library and apply the new learning. As a result of this initiative, three staff members from different areas of the library attended a national conference on adaptive technology in Bloomington, Minnesota; four circulation staff members attended the circulation conference at the University of Wisconsin; and three people attended the Internet Librarian '98 Conference in Monterey, California. They brought back many exciting ideas that are now being incorporated into the operations of the library.

### Staff Day

Multnomah County Library sponsored its seventh all-day staff in-service day this year. This event features a variety of classes and workshops and the chance for all staff to be together. A staff team representing a variety of job classifications and locations plans and produces the day's events. This year's theme *Back to the Basics* emphasized books and reading. The event was highlighted by the annual State of the Library address by library director Ginnie Cooper, and included 44 break-out sessions which included sessions on book making, author presentations, a slide show on canoeing, and a session on "Everything You Didn't Want to Know About Menopause."

### Results

Our measures for success are primarily anecdotal but we are working on data gathering methodologies. Every training session includes written evaluation and feedback mechanisms and this information is an important part of our improvement process.

We have also been tracking the public's response. The patron feedback mechanism in our library is known as "Ginnie Coupons." We encourage the public to send comments or suggestions on coupons that are available at all public service points. Coupons that include an address receive a written response from Library Director Ginnie Cooper. We have tracked the number and type of concerns while we have been incorporating this large number of new staff and were happy to find no significant increase in the number of complaints. And we were pleased by the number of compliments about great public service that we received from the public.


There are also downsides to any new program, and here are a few we experienced. This approach takes considerable time and energy. It is not a quick fix. It is difficult and challenging to be continually adapting and retraining. It is difficult to keep everyone informed. It is very hard to incorporate this much staff development into work schedules, and hard to incorporate new learning into day-to-day work. Dilbert cartoons often appear on staff bulletin boards, and it some-

times feels like we are caught in jargon and the management theme of the day.

### Next Steps

The activities outlined here are only representative of the learning that is going on at Multnomah County Library. Every day, teams and committees meet and work to solve issues and complete projects. Staff help each other learn new skills by coaching and in over-the-shoulder training. Often these "just in time" learning opportunities are the most helpful way to assimilate new skills. We continue to work on developing team skills and implementing performance planning for all staff.

We also have several additional system initiatives that need curriculum development including reference, circulation, question handling for everyone and leadership development. We need to continue to fine tune and improve on programs in place and we need to continue talking about what works and what doesn't.

The learning organization literature emphasizes the amount of time, energy and resources it really takes to make change permanent. We are finding this to be true. But, we believe the challenge of providing excellent public service in an evolving information environment requires us to create a workplace that dedicates the required resources to staff development and training and learning. 

*Many people helped in the preparation of this article. Much of the theoretical thinking about the learning systems approach is being done by Deputy Director Ruth Metz. The Learning Systems staff has included Jane Mackinnon, Marilyn Shayegi, Lise Brackbill, Serena Gomez, Eva Miller, and Patricia Welch. Sharon Klemp and Jan Thenell assisted in compiling and editing.*



Deputy Director Jeanne Goodrich presenting on intellectual freedom issues.